United Nations
Economic Commission for Europe

Food and Agriculture Organization
of the United Nations

ECE/TIM/INF/6

TIMBER AND FOREST INFORMATION SERIES

TIMBER COMMITTEE YEARBOOK

1999

UNITED NATIONS

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United Nations Economic Commission for Europe
Food and Agriculture Organization
of the United Nations

Timber Section
Geneva, Switzerland

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New York and Geneva, 1999

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ABSTRACT

The UN-ECE Timber Committee Yearbook 1999 contains an overview of the Committee's activities and bibliographical references for its publications. The Committee's activities include broadly: contributing to follow-up to UNCED and the pan European Ministerial Conference for the Protection of Forests; its annual session as well as those of its subsidiary bodies and teams of specialists; collection and analysis of statistics on forest products, forest products markets and forest resources; promotion of sustainable forestry; and, assistance to countries in transition in central and eastern Europe.

THE UN/ECE TIMBER COMMITTEE YEARBOOK 1999

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PREFACE

The *Yearbook* is intended to disseminate the information on the Timber Committee's activities among those for whom it would be most useful - experts in the fields under consideration. The aim is twofold: to provide an overview of the Committee's activities; and to provide bibliographical references, so that interested experts may obtain the necessary documents as quickly and easily as possible. The *Yearbook* can not be an exhaustive account of all the Committee's activities, which are set out in the Committee's formal report and associated documents.

Information about the publications or any other aspect of the Committee's work may be obtained by writing to the secretariat:

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I. THE TIMBER COMMITTEE'S ACTIVITIES IN 1998

1. Promotion of sustainable forest management in the region

Promotion of sustainable forest management in the region is at the heart of all the Committee's activities, which should all contribute to this overall goal. The Committee's core function is "monitoring and analysis of sustainable forest management in the region", in a wide variety of ways, notably through regular statistics and market analysis, forest resource assessments and outlook studies.

On a more political level, the Committee made a significant input to the third Ministerial Conference on the Protection of Forests in Europe, at Lisbon in June 1998. This consisted essentially of two actions:

- providing information on quantitative indicators of sustainable forest management on the basis of interim results of the Temperate and Boreal Forest Resource Assessment 2000;

- preparing the discussion of issues on socio-economic aspects of the forest sector, which facilitated the preparation of resolution L2, approved by the Ministers.

Since the Conference, the Committee has suggested to start work in two areas identified as being of importance for sustainable forest management:

- trade and environment issues in the forest sector ;
- strategies to stimulate and promote the sound use of wood and other forest based products as environmentally friendly and renewable raw materials.

In addition, the Committee is participating in the discussions to draw up a pan European programme of work on forests, under the aegis of the Ministerial process but in cooperation with international organisations such as ECE, FAO and ILO.

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2. Recycling, energy and market interactions

The Team of specialists on recycling, energy and market interactions had two major activities on the same themes in 1998: the special topic presentations at the Timber Committee Session; and a workshop in Istanbul, Turkey.

For the Timber Committee Session special topic, papers were presented on:

- System description;
- Renewable energy for the future;
- Wood energy, trade patterns and legislation influences;
- Wood energy generation in Slovakia;
- North American outlook for pulp and paper demand and its effects on fibre supply;
- Influence of industry decisions on site, raw materials and of scale.

Following the presentations, a panel discussion was held with questions from the Committee. The papers of the special topic will comprise a Timber and Forest Discussion Paper to be published in both hard copy and also available on the Committee's Website.

The Team also held a workshop in Istanbul on these same subjects in November 1998. Speakers and participants from Asia and Europe discussed the status, opportunities and problems in wood and paper recycling, generation of energy from wood and the current and future effects on timber markets. Seventy participants from 21 countries ensured diverse viewpoints in the presentations and discussions. The workshop was hosted by the Ministry of Forestry in Turkey with additional contributions from Norway and Sweden for some participants' expenses.

The workshop began with two keynote speeches on "The opportunity of forest plantation investment and its expected impact on the national economy in Turkey" by Dr. Ali Sencer Birler, Director, Poplar and Fast Growing Forest Trees Institute, Turkey and "Wood Products at the end of their life: material recycling, energy generation or landfill? Technical, economic and ecological aspects." by Dr. Arno Frühwald, Director, Federal Research Center for Forestry and Forest Products, Germany. Four technical sessions followed :

1. Legislation and its effects on recycling and energy;
2. Recycling;
3. Energy generation from wood;
4. Market interactions.

The final session approved conclusions and recommendations which will be brought to the Committee attention at its 1999 session. A study tour was held in both the European and Asian sides of Istanbul to visit paper recovery facilities, recycled paper paperboard production and the use of wood residues from a sawmill and wood-based panels manufacturing for and energy generation.

The proceedings of the workshop are to be published, perhaps only electronically, in 1999. A report of the workshop will also be available on the Committee's Website.

The Team held its last meeting in Istanbul and recommended that the Committee continue to follow developments in these important topics. Furthermore, since the mandate of the Team has been accomplished, it recommended that its formal activities cease. The report of the meeting will be presented to the Committee.

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3. Forest Resource Assessment 2000 - Temperate and Boreal Zones

The year 1998 was a decisive period in the implementation of the Temperate and Boreal Forest Resources Assessment (TBFRA-2000). The majority of the 55 TBFRA countries satisfactorily replied to the challenging enquiry, which was sent to national correspondents in September 1997. While the TBFRA-2000 is an ambitious and challenging project, it had been proved that the detailed enquiry provided an indispensable instrument to implement the assessment successfully.

The status and progress made in the TBFRA-2000 implementation was reviewed at the meeting of the Team of Specialists held in March 1998 (Ispra, Italy). The team noted achievements and gains, as well as difficulties and problems to be overcome within the project. The meeting defined the scope of work which had to be done in the forthcoming months and provided, in particular, useful recommendations on the preparation (on the basis of the preliminary TBFRA information) of the interim report for the pan-European Ministerial Conference.

The project proved to be an important area for the fruitful and mutually beneficial cooperation between the UN-ECE/FAO and the pan-European process on the Protection of Forest in Europe. The preliminary TBFRA results were summarised in the report presented to the Lisbon Ministerial Conference (June 1998). It should be noted that the Lisbon report (28 tables accompanied by charts, grafts and explanations) had been supplied before the validation and analysis process could be completely finished, so the data were not final and still had to be significantly improved for publishing in the Main TBFRA-2000 Report.

A number of important meetings with the high level experts (consultants) were held in 1998 with the main objective to review and discuss methods and practical issues of the Assessment, as well as the presentation of different thematic topics (general forest resources information, ownership status, biodiversity, wood supply and carbon sequestration, forest condition and damages to forest and other wooded lands, NWGS, etc) in the main TBFRA-2000 publication.

The process of checking and validation of the statistical data and other forest resources information has helped to improve significantly the original national replies to the TBFRA enquiry. The completeness of the information received from countries was verified with the so called "tables of the essential (must-have) data". Only a few countries were not in a position to provide the data for all the parameters included in this table.

The TBFRA information (statistics, explanations, comments, etc) has been loaded into the electronic database (by the end-1998), so as to facilitate the data handling in the process of their publication and dissemination. Generally, the progress made so far in the TBFRA implementation should be considered satisfactory and encouraging, keeping in mind the scope of the information to process, and a very tight time-schedule in the preparation of the draft Main TBFRA-2000 Report (by spring 1999).

The next meeting of the Team of specialists on TBFRA-2000, to be held from 22 to 24 March 1999 in Geneva, will review the TBFRA results (the first draft of the TBFRA-2000 publication) and provide its final practical recommendations before the survey is published. The TBFRA-2000 Main Report has to be considered (before the publication) by the twenty-second session of the Joint UN-ECE/FAO Working Party on Forest Economics and Statistics in May 1999. The Working Party will take into consideration the recommendations and comments by the Team of specialists and advise to the secretariat on how the report should be finalised.

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4. Assistance to countries in transition of central and eastern Europe

The cooperation with countries in transition of central and eastern Europe (CITs) continues to be the priority area of the UN/ECE Timber Committee and the FAO European Forestry Commission programmes of work. The twenty-first session of the Joint ECE/FAO Working Party on Forest Economics and Statistics confirmed the position concerning the promotion of the process of economic reform and transition to a market economy in the CITs. It noted, in particular, that topics and themes in the programme of assistance should be in line with the priorities and needs seen by countries.

The Joint ECE/FAO/ILO Committee on Forest Technology, Management and Training (Slovakia, September 1998) also reviewed this area of its activity. In particular the results of a PHARE project, which was aimed to analyse the needs of the forestry sector of 13 participating countries in central and eastern Europe and to draw up a programme of action at the national levels, were over viewed. The implementation of these programmes would have been extremely beneficial to the countries, but unfortunately it could not any longer be supported by the project due to a shortage of funds.

The Committee noted that the Team of specialists on problems in the forest and forest industry sector arising from radiation contamination, particularly from the Chernobyl disaster (activities closely related to CITs problems) had already identified the main issues, and the main needs for assistance, and had completed its task. The Team's work had stimulated interest from funding organisations, including EBRD, DHA and the World Bank, in forest/radiation issues and thus performed a very useful service. The results were presented in a report with the project proposal on how to deal with the consequences for forest of the Chernobyl disaster. The proposed project had been approved and the UN Department on Humanitarian Affaires was now seeking the required US$ 23.3 million donor funding for its implementation. The work of the Team on this subject was appreciated and the Team had accomplished its mission. The need now was for resources, on a quite a large scale, which neither ECE nor FAO were in a position to provide.

The ECE/FAO secretariat has continued to implement its mandate as international coordinator for Helsinki resolution H3 on forestry assistance to countries in transition. The electronic database (designed in ACCESS format), which includes the information on the topic supplied by national correspondents on project by project basis, has been further developed. The detailed report on the implementation of the resolution H3 was prepared on the basis of this database, and successfully presented at the Lisbon Ministerial Conference on the Protection of Forests in Europe (June 1998).

The fifty-sixth session of the UN/ECE Timber Committee (October 1998) examined and endorsed the activities carried out and planned in support of CITs in the forest and forest products sector, mainly the monitoring of H3 implementation. The Committee concluded that "the database on forestry assistance to countries in transition, established under resolution H3 will be updated regularly and made widely available."

The number of the relevant events have shown that the work on countries in transition was very useful, but it has also been noted on different occasions that the needs and interests of these countries at this stage were essentially the same as those of other member states. At the workshop on **"Certification of sustainable forest management in countries in transition"** (Czech Republic, August 1998) some countries even shown the signs of rejecting the designation of "countries in transition to market economies" and would prefer to be called "countries in central and

eastern Europe". The Timber Committee should be sensitive to this point. The Joint ECE/FAO/ILO Committee endorsed the position that it should not any longer have "a separate programme for countries in transition, but rather ensure that their concerns were reflected in the design of its regular activities and foster the participation of these countries in its work." This view was echoed by several delegates from central and eastern European countries.

This issue should be addressed at the next meeting of the Team of Specialists to monitor and develop assistance to countries of central and eastern Europe in transition in the forest and forest products sector which is planned for the 1999. The Team will also review current developments in the CITs' area, including H3 implementation, programme of workshops, partnerships and cooperation with other institutions, and other details. The potential cooperation with other international organizations working on the CITs issues will be in the focus of the Team's attention. The Austrian government has provisionally suggested to consider a possibility to host the meeting of the Team.

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5. Forest products markets, 1997-1999

Overall, ECE region forest products consumption increased in 1997, in some cases to record levels and it was forecast to grow in Europe, North America and the Russian Federation in 1998 and 1999 at the October 1998 Committee Session. Information for this section comes from two *Timber Bulletins*: *Forest Products Annual Market Review, 1997-1998* and *Forest Products Markets in 1998 and Prospects for 1999.*

European sawn softwood markets, increasingly to Japan, were strong in 1997. North American housing construction and furnishing drew increased quantities of sawnwood and wood-based panels. European consumption of wood-based panels, mainly particle board, increased close to North American levels, which are increasingly made up of OSB and MDF. However, oversupply of some forest products in the ECE region weakened prices.

Some initial signs point to a slowdown in the decline of forest products markets in the Russian Federation. While still experiencing severe economic difficulties, some signs were evident that the declines in forest products markets in the *Russian Federation* have slowed. Roundwood removals continued to decline in 1997, as did sawnwood production, but the exports of some products increased slightly, specifically sawnwood, panels and pulpwood. Log exports from Russia to Japan continued to grow though 1997, increasing in both volume and market share in a declining market which has fallen in volume by about one-third over the last decade, and which was falling faster in mid 1998. Other countries in transition fared better in 1997 and some had both rising consumption and rising exports as their economies progressed out of the transition period.

Globalization of forest products markets was demonstrated in late 1997 and in 1998 as the economic crisis in Asia disrupted trade with the ECE region. These developments are documented in a special chapter in the *Forest Products Annual Market Review, 1997-1998* titled "Effects of the Asian crisis on ECE region forest products markets".

A number of new and continuing trends are shaping the ECE region forest products markets, e.g. new markets for certified forest products, increasing substitution by engineered wood products for solid wood, and corporate restructuring. Markets for *certified forest products*, ie those products coming from forest lands which have been certified to be sustainably managed, are still in their infancy. Some of the first shipments of certified sawnwood occurred in the ECE region in 1997. At this time the incentive to produce certified products is not for immediate profitability, but rather to protect or increase market share or to establish a positive corporate image. Buyers' groups have been established in a number of ECE member countries and currently some larger do-it-yourself store chains and some publishers are providing the main impetus for the development of these markets, rather than the final customers themselves. A second special chapter in the *Review* details the "Certified forest products marketplace."

European *panel markets* rose in 1997, especially for particle board whose production and trade increased again. Demand and production of MDF soared, but OSB still has only a small (but growing) share of the wood-based panel market in Europe. Consumption of wood-based panels, particle board, fibreboard and plywood combined, are approaching that of North America. Europe's net exports expanded in 1997.

North American panel markets continued to evolve away from plywood and particle board with substitution by OSB and MDF. Strong demand for these newer panels due to more housing and furnishings, was met by a surge in manufacturing which created localized oversupply situations and prices have fallen, or at least not risen.

Paper and paperboard consumption increased throughout the ECE region. Pulp production also rose, but less fast, and market pulp prices recovered from the low of early 1996. Record volumes of pulpwood were consumed. Pulpwood prices ceased to fall in Europe and rose through 1997 in several countries. The trade in pulpwood from Russia and the Baltic states to Finland and Sweden continued to expand.

Some additional *trends* are occurring in the ECE region forest products markets. *Engineered wood products* continue to substitute for solid wood products, which is perceived to be better than the substitution by non-wood products. Wooden I-beams, glulam beams, laminated veneer lumber (LVL), composite panel products like OSB and MDF, and other reconstituted wood products are changing housing and furniture construction practices and increasing market shares.

Corporate mergers continue in order to gain market share, acquire forest resources and manufacturing capabilities and to achieve efficiencies of corporate, including marketing structures. Both new products, e.g. engineered wood products, as well as traditional primary forest products, e.g. pulp and paper manufacturing, are increasing in efficiency and necessitating corporate restructuring. In some sectors automation and modernization have been essential to maintain profitability when either product prices are constrained by competition or raw material costs are increasing or both.

Forecasts for 1998 and 1999 by the Timber Committee in October 1998 were generally positive for Europe and North America in 1998, however they were extremely cautious for 1999 in light of the unresolved Asian economic crisis, the current Russian financial crisis and the difficulties in Latin American markets. Panel production, especially MDF in Europe, and OSB in the North America, was forecast to continue its fast growth, outstripping domestic consumption, creating concerns for future price levels. Sawn softwood consumption and production in Europe was forecast to grow in contrast to North America which could be harder hit by the slowdown in Asian imports. Sawn hardwood consumption is forecast to strengthen in Europe and in North America with corresponding increases in production and trade. Overall the forecasts for the Russian Federation were for slight decreases in 1998, but rising back in 1999.

Effects of the Asian Crisis on ECE region forest products markets

The Asian crisis is being felt worldwide, in many sectors, including the ECE region's forest and forest industry sector.

* The entire forest and forest products sector has felt the shocks and by necessity, made initial strategic adjustments.
* Industries dependent on Asian trade have found alternative markets and cut production.
* Structural changes in economic systems must precede recovery in forest products markets.
* Reduced forest products exports to Asia have created oversupplies and in some cases forced prices down.
* European sawnwood exports made up 17% of Japan's sawnwood imports in 1997, but in mid 1998, market share growth stalled with the downturn in demand.

The aim of this special chapter in the *Forest Products Annual Market Review* is to identify and, to the extent possible, quantify the consequences of these macro-economic developments for the forest and forest products sector, and in particular for forest products markets in the ECE region. Since the Asian crisis centres around Japan, the largest consumer of tropical forest products, some additional information is presented on Japanese forest products trade and production in 1997 and 1998. Indonesia is highlighted to illustrate the situation of an Asian producer.

The globalization of forest products markets was demonstrated in 1997 as the economic and political *crisis in Asia* had a profound effect on world forest products trade. Japan entered into a deep recession and housing construction, which had significantly fallen in 1997, continued to decline in 1998. Domestic production, mostly based on imported raw materials, and imports of all forest products had decreased since mid 1997. Japan is the largest tropical forest products importer and the drop in economic activity had directly and indirectly affected the

whole of Asia, as well as the ECE region. Conditions were even more difficult for southeast Asian producers: despite sharply devalued currencies, they were unable to increase market share because of multiple supply constraints, often linked to the chaos in the banking system.

In 1998 ECE region forest products exports to Japan, and many other Asian destinations, with the possible important exception of China and Hong Kong, had tapered significantly. Prices were forced lower, but with initial stocks of higher-priced wood, Asian importers could not absorb more, especially in light of the unpredictable outlook. Asian plywood, sawnwood and log prices crashed in dollar terms with currency devaluations, ending in many cases less than half of their former values. As a consequence of the current crisis, a structural change in Asian forest products markets may be underway, characterized by more trade in further processed products and the substitution of products based on small wood, often of plantation origin (e.g. oriented strand board (OSB), medium density fibreboard (MDF), market pulp, engineered wood products), for traditional solid wood products of the tropical forest.

Certified forest products marketplace

Some highlights follow from a special chapter in the *Forest Products Annual Market Review, 1997-1998* on the market for certified forest products, ie those wood-based products which can be identified as coming from forests which have been certified, generally by a second or third party, to be managed sustainably.

- There are several active certification schemes in the ECE region and many more under development.
- The only third-party, performance-based scheme with products apparent in the marketplace is that from the Forest Stewardship Council.
- Offering certified products can increase access to markets.
- There appears to be little consistency in the ability to gain premiums.
- The majority of Forest Stewardship Council certified forestland is in Poland, Sweden, and the United States.
- Forest Stewardship Council certified land area has more than doubled during the past year to approximately 10 million hectares by June 30, 1998.
- Most demand for certified products is from a growing number of buyers' groups.
- A true picture of the marketplace is difficult to construct due to lack of statistics.
- Final consumers are not currently a significant influence in the marketplace.
- The industry trading in certified products is underdeveloped with key gaps in its infrastructure.

Forest certification is one element of the larger discussion surrounding sustainable forestry. During the past several years, certification has been closely followed by the Timber Committee. From 1994 to 1997 a Team of specialists assessed the status and direction of forest certification in the region. The Committee is committed to following certification developments in the ECE region. This chapter outlines developments in certification schemes and the present state of the marketplace. The chapter was written by Dr. Eric Hansen, Oregon State University, who will co-author a *Geneva Timber and Forest Discussion Paper* on the same subject in 1999 which will be both published and available on the Committee's Website.

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6. Intersecretariat Working Group on Forest Statistics

For some years now, a number of permanent intergovernmental organisations, including ECE as well as FAO, EUROSTAT, OECD, European Environment Agency, International Tropical Timber Organisation (ITTO) and the Commission of the European Communities, have worked together to simplify and harmonise data collection and dissemination. In 1998 it was agreed the ECE/FAO/Eurostat annual questionnaire on forest products production and trade should be expanded to include also ITTO. Data is collected with a joint questionnaire by one of the organisations, and then shared between all, economising secretariat resources and, even more important, those of member countries, as well as improving data quality and availability for all. There has also been strong inter-organisation cooperation in preparation of the TBFRA 2000.

This search for synergies continues as the IWG meets regularly.

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7. Forest Technology, Management and Training

The Joint FAO/ECE/ILO Committee on Forest Technology, Management and Training held its biennial session in Zvolen (Slovakia), in September 1998. The study prepared by its team of specialists on socio-economic aspects of forestry "People, Forests and Sustainability" had served as the basis for drafting resolution L1 of the Lisbon Ministerial Conference on the Protection of Forests in Europe. The Joint Committee expressed its wish to continue to contribute to the pan-European process in favour of sustainable forest management and agreed on the scope and methods of cooperation.

Three special topics were presented: forests and forestry in Slovakia, social aspects of forestry and multiple-use forestry. The Joint Committee reviewed recent achievements and developments in its field of interest, prepared proposals for its programme of work, including notably social aspects of sustainable forest management, public relations and environmental education in forestry, participation and partnerships in forestry and the role of women in forestry. It reviewed and approved a programme of work for 1999 to 2003.

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8. Improving working conditions and increasing productivity in forestry

Banska Stiavnica (Slovakia), September 1998

In all countries, forest enterprises are under growing pressure to increase productivity in order to be able to compete in a global market for forest products. Significant differences in productivity exist not only between ECE member countries but also between enterprises within a given country. In the past, efforts to raise efficiency focussed on reducing the direct cost of forest operations. This strategy has been very successful and productivity gains in forest operations often matched or exceeded those in other economic sectors. Increasingly sophisticated mechanization and in recent years information technology have played a major role in bringing about these achievements. It is often overlooked, that the introduction of new technology also required a simultaneous improvement of working conditions in order to be successful. In developing new technologies and work methods, the Nordic countries have attached much importance to the relationship between working conditions and productivity. The synergies between these factors is one of the reasons for the leadership position the Nordic countries have in forest technology.

The potential for raising productivity by improving working conditions is often underutilised. One of the main reasons for this is the lack of evidence concerning the cost/benefit ratio of such investments as these benefits are difficult to quantify. A recent development leading to more attention to human resources and social aspects has been the spread of total quality approaches and certification of forest management. Social and labour aspects such as working conditions and occupational safety and health as well as skill requirements can and should be incorporated into such schemes.

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9. First Baltic Conference on Forest Fire

Warsaw (Poland), 4-8 May 1998

Countries neighbouring the Baltic Sea (Denmark, Estonia, Finland, Germany, Lithuania, Latvia, Norway, Poland, Russia and Sweden) are one of the regions in Europe with high fire risk and significant level of environmental contamination. Forests of that region are very valuable for the nature as well as in economic and social terms. The great majority of forest fires break out as a result of direct or indirect human activities. Due to global environmental changes and ever increasing pressure imposed on the forest by the society it is expect a further increase of fire risk in that region.

To solve current and future problems regarding forest fire protection it is necessary to constantly enhance and standardise forecasting, detection and extinguishing activities and improve legal regulations. The prerequisite for the effectiveness of these activities is the development of a comprehensive cooperation in the field of science, technology and organisational aspects with the contribution from the public at the international, national and local level.

The Conference recognised that forests in the Baltic States should be managed in compliance with biodiversity principles and estimated that an international programme for fire protection in the Baltic states should be developed. Protection of woodlands against elemental disasters should be included in cooperation agreements especially in transboundary areas. The Conference recommends that the problem of forest fires should be handled in compliance with the Action Plan Baltic 21, regional activities of the International Decade for Natural Disasters Reduction (IDNDR), as well as other programmes.

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10. Forest fires

ECE/FAO Forest Fire Statistics 1995-1997

The Joint ECE/FAO Working Party on Forest Economics and Statistics, has been collecting forest fire statistics since 1980. The results of the latest enquiry carried out in 1997, in close cooperation with the Commission of the European Communities, has been issued. The publication provides information on the number, area, and causes of fires in Europe, the Russian Federation and North America. Copies of the publication are available free of charge from the secretariat and the statistical tables are posted at the Committee's Website.

SUMMARY TABLE - TOTAL AREA OF FIRES (1000 ha)

	1993	1994	1995	1996	1997	1993 -97 average
Europe	497.8	739.5	407.9	258.8	299.1	440.6
of which, southern Europe [a/]	486.2	726.4	400.6	241.6	284.5	427.9
Russian Federation	1222.6	745.1	502.2	2464.1	1383.5	1263.5
North America	3671.2	7831.5	7356.5	4330.1	1658.9	4969.6

[a/] Albania, Bosnia and Herzegovina, Bulgaria, Croatia, Cyprus, France, Greece, Israel, Italy, Portugal, Slovenia, Spain, The former Yugoslav Republic of Macedonia, and Turkey

International Forest Fire News (IFFN)

IFFN is a biannual ECE/FAO publication, which is intended to enhance the exchange of information on wildland fire management and related sciences. It provides information about fire related issues in various countries: fire management programmes, cooperation, recent and forthcoming meetings and publications. Short reports provided by government bodies or individual scientists and managers are given together with bibliographical sources and contact addresses. It also serves as news bulletin for IUFRO's Subject Group S1.09, Forest Fire Research. It is produced with the cooperation of the International Global Atmospheric Chemistry (IGAC) Project (IGBP), the International Boreal Forest Research Association and the Bureau of Land Management of the United States Department of the Interior. Copies are available free of charge from the secretariat.

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11. Public relations in the forest and forest industries sector

Thirty-two participants representing 13 countries of the FAO/ECE Team of Public Relations Specialists in the Forest and Forest Industries Sector met in Sesimbra, Portugal in May 1998 and discussed: the environmental promotions of competitors to wood, paper and paperboard; potential markets for certified forest products in Europe and consequences for PR activities; PR activities for the Third Ministerial Conference on the Protection of Forests in Europe; and special PR activities in countries and regions.

At the meeting, the Team took the proposed field trip for the Third Ministerial Conference on the Protection of Forests in Europe which was to be held the following month in Portugal and then offered a series of considerations and suggestions for the organizers.

The Team's proposed mandate was approved for extension through 2000 by its parent bodies, the FAO European Forestry Commission (EFC) and the Timber Committee (TC), which will enable the Team to continue its activities:

- Conduct its next meeting, with focus on PR in central and eastern European countries (CEECs) in Sagadi, Estonia on 17-19 May 1999;
- Provide PR follow-up on Lisbon Pan-European Conference for the Protection of Forests in Europe resolutions, especially as applied to the TC and EFC;
- Conduct the International Forestry Communicators Forum 2000;
  Publish and provide PR on the report on the campaigns of wood and substitute materials like concrete, steel and plastic;
- Extend the Team's network to include more Mediterranean countries and CEECs;
- Increase PR activities concerning certification of sustainable forest management;
- Provide PR follow-up to the recommendations from TC workshops titled "Wood--an environmentally friendly material" and other workshops;
- Increase the use of Internet to communicate PR on the TC and EFC activities and outputs and establishment of a PR Team Website within the TC site.

II. ACTIVITIES PLANNED FOR 1999 AND 2000

This section is intended to provide readers with information on the Committee's forthcoming activities. It is not a definitive programme, as additions or deletions sometimes have to be made at fairly short notice. Meetings are formally announced by the circulation of a provisional agenda at least three months before their scheduled date, and a press release is also issued.

Attendance at seminars, symposia and study tours organized by the Committee is open to experts in the subjects to be discussed, with permission of their Governments. Further information about all this activities is available on request from the secretariat.

The Timber Committee's annual session

The Timber Committee meets annually in Geneva: its 1999 session is provisionally scheduled from 27-30 September. The main items on the agenda are: support to UNCED and the pan-European process on the Protection of Forests; the forest resource assessment 2000, temperate and boreal zones; review of recent developments and prospects in the coming year in the forest products markets; review of activities of its subsidiary bodies and of meetings held over the previous year under its auspices.

Study tour on forest and forest industries in Ireland

Coillte Teoranta - the Irish Forestry Board is hosting the joint UN/ECE Timber Committee and FAO European Forestry Commission study tour from 5-11 September 1999. The tour will provide an opportunity to visit forests and forest industries in Ireland and to experience the unique landscapes, culture and traditions which make the Ireland the land of *Cead Mile Failte* (one hundred thousand welcomes).

Forest cover amounts to 500,000 hectares or 8% of the land area. The forest estate comprises plantations of North American species, primarily Sitka spruce, established on land which is considered marginal for agriculture. Excellent climatic and growing conditions mean that growth rates of up to 24 cubic metres per hectare per annum can be achieved. The area of the forest estate is increasing at a rate of 15,000 hectares annually and timber production is now approaching 3 million cubic metres annually. A Strategic Plan for the forestry sector adopted in 1996 envisages that forestry will expand to 17% of the total land area resulting in annual timber production of 13.5 million cubic metres by 2035.

The steady increase in wood fibre availability has supported the development of a modern timber processing sector. Substantial investment in recent years in sawmilling has resulted in a number of mills with annual output in excess of 100,000 cubic metres. In the panelboard sector Ireland has three world-scale industries: an oriented strand board (OSB) mill operated by Louisiana-Pacific as a joint venture with Coillte, the Willamette of Europe MDF plant and a moulded door skins plant owned by Masonite Inc.

The industry in Ireland faces a number of challenges including the marketing of its increased timber output and compliance with international Sustainable Forest Management requirements. The tour will provide an opportunity to explore how these challenges are being addressed.

Participation in the study tour will be open to representatives of the Timber Committee and the European Forestry Commission as well as representatives related to the forest and forest industries sector from member countries of the UN-ECE and other member countries of the United Nations. The number of participants will be limited for logistical reasons.

A detailed information note including the provisional programme and a registration form can be obtained on request from the secretariat (see address on page iv) and posted at the Committee's Website.

Statistics

The Committee will continue to publish its regular statistics in the *Timber Bulletin*, on forest products production and trade, trade flows of forest products, the monthly prices for forest products, and the results of the annual enquiry on forest fire.

Forest products markets

Other issues of the *Timber Bulletin* will contain the Committee's regular review and analyses of short-term developments in forest products markets. The annual forest products market review covers trends in the previous year and is published in July/August. The results of the Committee's discussions at its annual session, when it prepares forecasts for the current and forthcoming year, are issued in November.

Forest technology management and training

The Joint FAO/ECE/ILO Committee and its Steering Committee meet in alternate years. The Steering Committee will hold its fourteenth session from 17 to 18 September 1999 in Pessac (France) in conjunction with the seminar on forest operations of tomorrow. The Joint Committee will hold its twenty-third session from 5 to 8 June 2000 in Geneva. The following seminars and workshops will be organized in 1999 and 2000 under the auspices of the Joint Committee:

1999

Title: **Seminar on Forest operations for tomorrow**
Date: 20-24 September
Location: Pessac, France

Objectives: To review developments for ecologically sound and sustainable forest operations in the short- and mid-term and provide a clear vision of the changes needed and approaches as how to implement them. The forest sector is confronted with increasing and sometimes contradictory demands concerning environmental functions, protection, recreation among others. At the same time the forest remains the most important source of renewable raw material. Certain changes are already taking place in the way the forest sector works, in a context of a growing global economy. The seminar will provide a forum for international dialogue and exchange of experiences to assure that changes are progressive.

Target groups: All forest professionals, forest owners, managers, forest industries, administrations and associations, research institutes and technology transfer and training centres.

Title: **Workshop on reducing the impact of forest operations on ecosystems**
Date: September (to be decided)
Location: Germany

Objectives: The workshop will provide detailed scientific information on the consequences of the impact of forest operations on ecosystems, will present risk assessment methodologies and will discuss the most important consequences with the purpose of drawing a set of draft guidelines. The following topics will be covered: machine impacts, soil dommage, soil measurements, tree damage and planning and recommendations.

Target groups: Forest professionals, forest owners, managers, administrations and associations, machine manufacturers, research institutes and training centres.

2000

Title: **Workshop on new trends in harvesting with cable cranes**
Date: 11-17 June
Location: Ossiach, Austria

Objectives: To discuss environmental concerns and policy demands favouring the use of cable crane and winch systems, taking into account soil protection and road construction restrictions. Development trends of cable systems and methods: smaller, highly mobile units, running skylines, hydrostatic transmissions etc. and newly developed wire/cable products. Planning procedures. Co-ordination between cable system method, landings and road transport, between use of cable system and other equipment and machinery and between use of cable system operations and multiple/recreational use. Training and safety aspects of cable system operators.

Target groups: Government agencies, forest managers

Title: **Workshop on information systems in forestry**
Date: to be decided
Location: Finland

Objectives: The management of information technology has become an essential part of forest management. Nearly all of these technologies require substantial new investments, not only in the technologies themselves but also in training of personnel and in the acquisition and validation of data. A strong and active commitment of managers is therefore essential if the new technologies are to be implemented at the organization's advantage as tools to improve strategic planning, tactical planning, and operations management and control.

Target groups: Forest managers, administrations and associations, research institutes and training centres.

Forest Economics and Statistics

The FAO/ECE Working Party on Forest Economics and Statistics meets every two years. It will hold its twenty-second session in Geneva from 26-28 May 1999. It will review the enquiry on the forest resource of the temperate zones, review the international forest sector statistical system and inter-organisation cooperation, and will adopt its programme of work for 2000-2004

Assistance to countries in transition of central and eastern Europe

At its annual sessions the Committee reviews its programme of assistance to countries in transition on the basis of recommendations of the team of specialists, which will meet in the second half of 1999, to ensure that it fulfils the expectations of this group of countries. The programme consists mainly in the organization of workshops, the following is scheduled: Workshop on development of marketing of forest products in countries in transition, Minsk, Belarus, to be decided, 1999 or 2000

Country profiles on transition countries of central and eastern Europe will continue to be published.

Forest Resource Assessment 2000 - Temperate and Boreal Zones

The results of the enquiry on Forest Resource Assessment 2000 - Temperate and Boreal Zones will be published in 1999.

III. BIBLIOGRAPHICAL REFERENCES

The Timber Committee publications (other than reports and associated documents) have been organized since 1994, into the following five series:

Timber Bulletin	ECE/TIM/BULL/xx/x
Timber and Forest Study Papers	ECE/TIM/SP/x
Timber and Forest Discussion Papers	ECE/TIM/DP/x
Timber and Forest Information Series	ECE/TIM/INF/x
Timber and Forest Seminar and Workshop Proceedings	no symbol

The Committee publishes the ***Timber Bulletin***, which provides regularly, detailed information on the forest products sector: statistics on production, removals, trade (total and by origin and destination), prices; the results of an annual survey on forest fires; analyses of market developments and prospects for the coming year. The contents of the ***Timber Bulletin*** in 1998 is set out in the bibliography.

The ***Timber and Forest Study Papers***, formerly publications in the ECE/TIM series, are composed of the European Timber Trends and Prospects Study (ETTS V), Forest and Forest Products Country Profiles, Forest Resource Assessment publications, medium-term surveys of the structure and capacity of the wood-based panels and sawmilling industries, and other special studies. The ***Timber and Forest Discussion Papers*** are intended to be a means of distributing current topical information in the forest and forest industries sector which might or might not become part of a more comprehensive study at some later time. Unlike the ***Timber Bulletin*** and the ***Study Papers***, the ***Discussion Papers*** have limited input from the secretariat and are published in their original language. ***Timber and Forest Seminar and Workshop Proceedings*** are not published by the secretariat, but by the host country of such activities, this explains why there is no identification code. Finally, the ***Timber and Forest Information Series*** which consists of this ***Timber Committee Yearbook***, plus ***Facts about*** ... the Committee and its two subsidiary bodies, which presents background information and activities of each of these bodies. A comprehensive list of publications appears at the back of this ***Yearbook***.

Set out below are bibliographical references to those documents issued under the Committee's auspices in 1998 which may be of interest to experts in the forest and forest products sector.

Issues of the ***Timber Bulletin*** are available on subscription (see below). Unless otherwise indicated, other documents are available on request, free of charge from the secretariat, while stocks last. **The documents are described under the same headings as the text of the *Yearbook***. Further information may be obtained from the Timber Section secretariat (see address on page iv).

1. PROMOTION OF SUSTAINABLE FOREST MANAGEMENT IN THE REGION

Report to fifty-sixth session of the Timber Committee (TIM/1998/4)
Report of fifty-sixth session of the UN/ECE Timber Committee (ECE/TIM/91)

2. RECYCLING, ENERGY AND MARKET INTERACTIONS

Special topic of the fifty-sixth session of the Timber Committee (TIM/1998/2)
Report to the fifty-sixth session of the Timber Committee (TIM/1998/5/Add.2)

3. FOREST RESOURCE ASSESSMENT 2000 - TEMPERATE AND BOREAL ZONES

Report to the fifty-sixth session of the Timber Committee (TIM/1998/5)

4. ASSISTANCE TO COUNTRIES IN TRANSITION OF CENTRAL AND EASTERN EUROPE

Report to the fifty-sixth session of the Timber Committee (TIM/1998/5)

Report on the implementation of resolution H3

The H3 database in ACCESS format is available at the Timber Committee Website

Reports of the workshops organized in 1998:

Certification of sustainable forest management in countries in transition can be otained on request from the secretariat

Forest and forest products country profiles

Forest and forest products country profiles have published for the following countries in transition:

former Czech and Slovak Federal Republic	(ECE/TIM/64)
Romania	(ECE/TIM/65)
Hungary	(ECE/TIM/66)
Poland	(ECE/TIM/67)
Albania	(ECE/TIM/73)
Estonia	(ECE/TIM/74)
Bulgaria	(ECE/TIM/SP/1)
Slovenia	(ECE/TIM/SP/2)
Lithuania	(ECE/TIM/SP/3)
Ukraine	(ECE/TIM/SP/4)
Belarus	(ECE/TIM/SP/5)
Rep. of Armenia	(ECE/TIM/SP/8)
Rep. Of Moldova	(ECE/TIM/SP/13)
Russian Fed.	(ECE/TIM/SP/14)

5. FOREST PRODUCTS MARKETS 1997-1999

The ***Timber Bulletin*** consists of 6 issues a year and is available on an annual subscription. For further information, those interested are invited to contact the United Nations Distribution and Sales Unit, Palais des Nations, 1211 Geneva 10, Switzerland (Fax N°: +41 22 917 00 27).

The contents of the ***Timber Bulletin*** in 1998, Vol. LI, was as follows:

Title:	Issue:
Forest Products Prices, 1995-1997	ECE/TIM/BULL/51/1
Forest Products Statistics, 1993-1997	ECE/TIM/BULL/51/2
Forest Products Annual Market Review, 1997-1998	ECE/TIM/BULL/51/3
Forest Fire Statistics, 1995-1997	ECE/TIM/BULL/51/4
Forest Products Trade Flow Data, 1996-1997	ECE/TIM/BULL/51/5
Forest Products Markets in 1998 and Prospects for 1999	ECE/TIM/BULL/51/6

RELEVANT FAO STATISTICAL PUBLICATIONS

(available from: Distribution and Sales Section, Food and Agriculture Organization of the United Nations, Via delle Terme di Caracalla, I-00100 Rome)

FAO Yearbook of Forest Products 19976
State of the World's Forests 1998

Effects of the Asian Crisis on ECE region forest products markets

Timber Bulletin Forest Products Annual Market Review, 1997-1998 (ECE/TIM/BULL/51/3)

Certified forest products marketplace

Timber Bulletin Forest Products Annual Market Review, 1997-1998 (ECE/TIM/BULL/51/3)

6. INTERSECRETARIAT WORKING GROUP ON FOREST STATISTICS

Report to the fifty-sixth session of the Timber Committee (TIM/1998/5)

7. FOREST TECHNOLOGY MANAGEMENT AND TRAINING

Report of the twenty-second session of the Joint FAO/ECE/ILO Committee on Forest Technology, Management and Training, Zvolen (Slovakia) (TIM/EFC/WP.1/28)

8. IMPROVING WORKING CONDITIONS AND INCREASING PRODUCTIVITY IN FORESTRY

Report of the FAO/ECE/ILO seminar, Banska Stiavnica (Slovakia) (TIM/EFC/WP.1/SEM/47/2)

9. FIRST BALTIC CONFERENCE ON FOREST FIRE

Report of the FAO/ECE/ILO Team of specialists on forest fire (TIM/EFC/WP.1/1998/3, Annex 1)

10. FOREST FIRES

Timber Bulletin Forest Fire Statistics, 1995-1997 (ECE/TIM/BULL/51/4)

International Forest Fire News, N° 18 and 19 (two issues per year) can be otained on request from the secretariat

11. PUBLIC RELATIONS IN THE FOREST AND FOREST INDUSTRIES SECTOR

Report to the fifty-sixth session of the Timber Committee (TIM/1998/5/Add.1)

IV. LIST OF MEETINGS IN 1999 AND 2000

Note: The meetings are sub-divided into two categories: meetings marked (A) are open to delegates or approved representatives from all member countries of ECE as well as from other member countries of the United Nations and organizations accredited to ECE (or to FAO and ILO, in the case of meetings co-sponsored by them), while meetings marked (B) are those restricted to the countries or individuals nominated by their countries to take part in the activity concerned, e.g. a team of specialists.

1999

Date	Location	Title
22-24 March	Geneva	Meeting of the team of specialists on Temperate and Boreal Forest Resource Assessment 2000 (B)
4-5 May	Geneva	Meeting of the Timber Committee office holders and the EFC Executive Committee (B)
17-19 May	Estonia	Meeting of the team of public relations specialists in the forest and forest industries sector (B)
26-28 May	Geneva	Joint FAO/ECE Working Party on Forest Economics and Statistics, twenty-second session (A)
5-11 September	Ireland	Joint ECE Timber Committee / FAO European Forestry Commission study tour on forest and forest industries in Ireland (A)
17-18 September	Pessac (France)	Steering Committee of the Joint FAO/ECE/ILO Committee on Forest Technology, Management and Training, fourteenth session (B)
20-24 September	Pessac (France)	Seminar on forest operations of tomorrow (A)
27-30 September	Geneva	ECE TIMBER COMMITTEE, fifty-seventh session (A)
September (to be decided)	Germany	Workshop on reducing the impact of forest operations on ecosystems (B)
(to be decided)	Austria	Meeting of the team of specialists to monitor the programme of assistance for countries of eastern and central Europe in transition (B)
1999 or 2000 (to be decided)	Belarus	Workshop on development of marketing of sawnwood products in countries in transition (A)

2000

Date	Location	Title
April (to be decided)	Geneva	Meeting of the Timber Committee office holders and the EFC Executive Committee (B)
May (to be confirmed)	Finland (to be confirmed)	Workshop on information systems in forestry (A)
5-8 June	Geneva	Joint FAO/ECE/ILO Committee on Forest Technology, Management and Training, twenty-third session (A)
11-17 June	Ossiach (Austria)	Workshop on new trends in wood harvesting with cable cranes (A)
September (to be decided)	Rome (Italy)	ECE TIMBER COMMITTEE, fifty-eighth session in Joint Session with the FAO European Forestry Commission, thirtieth session (A)
(to be decided)	(to be decided)	Seminar on trade and environment issues in the forest and forest industries sector (A)
(to be decided)	(to be decided)	Seminar on strategies to stimulate and promote the sound use of wood and other forest based products as environmentally friendly and renewable materials (A)

SOME FACTS ABOUT THE TIMBER COMMITTEE

The Timber Committee is a principal subsidiary body of the ECE (UN Economic Commission for Europe) based in Geneva. It constitutes a forum for cooperation and consultation between member countries on forestry, forest industry and forest product matters. All countries of Europe; the former USSR; United States of America, Canada and Israel are members of the ECE and participate in its work.

The ECE Timber Committee shall, within the context of sustainable development, provide member countries with the information and services needed for policy- and decision-making regarding their forest and forest industry sector ("the sector"), including the trade and use of forest products and, when appropriate, formulate recommendations addressed to member Governments and interested organizations. To this end, it shall:

1. With the active participation of member countries, undertake short-, medium- and long-term analyses of developments in, and having an impact on, the sector, including those offering possibilities for the facilitation of international trade and for enhancing the protection of the environment;

2. In support of these analyses, collect, store and disseminate statistics relating to the sector, and carry out activities to improve their quality and comparability;

3. Provide the framework for cooperation e.g. by organizing seminars, workshops and *ad hoc* meetings and setting up time-limited *ad hoc* groups, for the exchange of economic, environmental and technical information between governments and other institutions of member countries that is needed for the development and implementation of policies leading to the sustainable development of the sector and to the protection of the environment in their respective countries;

4. Carry out tasks identified by the UN/ECE or the Timber Committee as being of priority, including the facilitation of subregional cooperation and activities in support of the economies in transition of central and eastern Europe and of the countries of the region that are developing from an economic point of view;

5. It should also keep under review its structure and priorities and cooperate with other international and intergovernmental organizations active in the sector, and in particular with the FAO (Food and Agriculture Organization of the United Nations) and its European Forestry Commission and with the ILO (International Labour Organisation), in order to ensure complementarity and to avoid duplication, thereby optimizing the use of resources.

More information about the Committee's work may be obtained by writing to:

Timber Section
UN/ECE Trade Division
Palais des Nations
CH - 1211 Geneva 10, Switzerland
Fax: + 41 22 917 0041
E-mail: info.timber@unece.org

Website address: http://www.unece.org/trade/timber

UN-ECE/FAO Publications

Timber Bulletin Volume LI (1998) ECE/TIM/BULL/51/...
Timber Bulletin Volume LII (1999) ECE/TIM/BULL/52/...

1. Forest Products Prices
2. Forest Products Statistics (database (chronological series, since 1964) also available on diskettes)
3. Forest Products Annual Market Review
4. Forest Fire Statistics
5. Forest Products Trade Flow Data
6. Forest Products Markets in *(current year)* and Prospects for *(forthcoming year)*

Geneva Timber and Forest Study Papers

Forest and Forest Products Country Profile: Russian Federation ECE/TIM/SP/14
(Country profiles also exist on Albania, Armenia, Belarus, Bulgaria, former Czech and Slovak Federal Republic, Estonia, Hungary, Lithuania, Poland, Romania, Republic of Moldova, Slovenia and Ukraine)
North American timber trends study ECE/TIM/SP/9
Long-term historical changes in the forest resource ECE/TIM/SP/10
European Timber Trends and Prospects: into the 21st century (ETTS V) ECE/TIM/SP/11
Forest and Forest Industries Country Fact Sheets ECE/TIM/SP/12
Non-wood goods and services of the forest ECE/TIM/SP/15

The above series of sales publications and subscriptions are available through national agents and booksellers (see next page "Order Form"), or through:

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Geneva Timber and Forest Discussion Papers *(original language only)*

Manual on acute forest damage ECE/TIM/DP/7
Interim Report on the Implementation of Resolution H3 of the Helsinki Ministerial Conference on the protection of forests in Europe (Results of the second enquiry) ECE/TIM/DP/12
The role of women on forest properties in Haute-Savoie: Initial researches ECE/TIM/DP/13
The Status of forest certification in the ECE region ECE/TIM/DP/14
ETTS V working papers:
Pajuoja,"The outlook for the European forest resources and roundwood supply" ECE/TIM/DP/4
Brooks, Baudin and Schwarzbauer, "Modeling forest products demand, supply and trade" ECE/TIM/DP/5
Baudin and Brooks, "Projections of forest products demand, supply and trade in ETTS V" ECE/TIM/DP/6
Eronen, "Forest resources and consumption of forest products in countries in transition, 1990-2020" ECE/TIM/DP/8
Issartel and Vikinge, "Price trends for forest products, 1964-1991" ECE/TIM/DP/9
European forests and timber: Scenarios into the 21st century *(sold with ECE/TIM/SP/11)* ECE/TIM/DP/10
Peck and Descargues, "The policy context for the development of the forest and forest industries sector in Europe" ECE/TIM/DP/11

Seminar and Workshop Proceedings *(original language only)*

- Seminar on "Exploring multiple use and ecosystem management: from policy to operational practice", Prince George, Canada, September 1995

International Forest Fire News *(two issues per year)*

Timber and Forest Information Series

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Printed at United Nations, Geneva
GE.99-20770-March 1999-1,755

United Nations publication